



Report to the Commissioners
Area IX Agency on Aging, Flathead County
June 17, 2019
Prepared by Lisa Sheppard, Director

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2017 actuals
FY 2018 annual targets
FY 2018 actuals
FY 2018 actuals as a percentage of annual targets
FY 2018 actuals as a percentage of FY 2017 actuals
FY 2019 actuals to date
FY 2019 annual targets
FY 2019 actuals as a percentage of FY 2019 annual targets

The general target is 83.33% for FY 2019, July 1, 2018-April 30, 2019, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

Data to note:

- The data in this report represents activity through April rather than May as many of the May numbers are not yet available. In April, I presented the new Area Plan on Aging in lieu of my normal report, and I did not present in May, so the “Total Last Report” column includes data through March 2019.
- The **# of unduplicated clients receiving Independent Living Services** is almost at target for the year. We had anticipated serving slightly more individuals this year than originally estimated due to federal fiscal year 2018 funding increases and an increased turnover in clients as we’ve moved to a sliding fee scale system. However, we are now projected we will be at or near target as we’ve had staff vacancies that have prevented us from bringing more people onto service.
- The **# of individuals receiving Melas on Wheels** is slightly under target for the year but well above the pace of FY 2018.
- The **# of seniors receiving Congregate Meals** continues to be above target for the year and outpaces last fiscal year.
- We’ve completed our **annual survey** of meal recipients and Independent Living Services clients. The overall satisfaction rate for both programs is 97%.
- **We continue to experience far fewer than expected complaints related to Eagle Transit services**, which we believe is the result of improved routes and services over this fiscal year.
- **Outreach/Education** efforts continue above target for the year due to BEC grant related outreach.

- **Meals/Nutrition** - Total meals served continue to be just under target for the fiscal year and just under the pace of last year.
- **Transportation**
 - Total rides have exceeded the annual target by 5% and almost 22% above the expected target for this time in the fiscal year.
 - While a portion of the increase is related to seasonal rides within Glacier National Park, excluding these rides, we've provided 12,944 more rides than this time last year.
 - For the first time, we exceeded 10,000 rides in a month excluding GNP rides.
 - Rides on our after-school program route have increased this year as ridership to the SPARKS program has grown substantially and we've added the Kalispell Parks-n-Rec program to the route on a trial basis. Last year at this time we provided 6,968 rides; this year we are at 18,360 rides, an increase of 11,392 rides. We were unable to reach an agreement with the City of Kalispell to continue these rides in the 2019-2020 school year.
 - Rides on the previously underperforming Kalispell fixed route continue to grow on both the AM and PM runs. We are up 1,923 rides on these routes from this time last year. In four months of operation, the new fixed route Orange Line has provided 2,085 rides in Kalispell, bringing the overall increase in rides to 4,008.
 - Our Dial-A-Ride (DAR) service, which now includes paratransit rides in Kalispell plus premium DAR rides in Evergreen and west of Kalispell, continues to provide fewer rides than last year (down about 29%) when all DAR rides were paratransit rides related to the Kalispell/Evergreen fixed route. However, many paratransit riders are now taking the Orange Line as it picks up at the front door of many senior and subsidized apartment complexes.
- **Independent Living Services**
 - The "unit of service" numbers are up to date through April. We continue to be above target for homemaker and for personal care and below target for the other services. We do not anticipate reaching our target for these services by the end of the fiscal year and will carry-forward the remaining federal funding into the next fiscal year.
- **Benefits Counseling**
 - We've substantially exceeded our target for the year due to our Benefits Enrollment Center grant outreach efforts, a greater than expected number of individuals requesting assistance during Medicare Open Enrollment and the addition of several extra Medicare 101 classes. We expect this pace to continue and are looking at potential staffing changes to better meet the growing need.
- **Ombudsman**
 - Ombudsman cases continue are slightly below target, which will continue through the end of the fiscal year as we work to fill a vacant position.

AOA Administration

Budget and Contracts

- We submitted budget amendments to Finance this month that include federal funding increases as well as other revised revenue and expenditure estimates. We're anticipating excess revenue for most funds related to increased Older Americans Act funding. We're projecting spending some reserves in Eagle Transit related to a combination of reduced revenue in bus wrap advertising and our DPHHS contract and higher than expected fuel costs and the ongoing increase in health insurance costs. In addition, we've received all back-logged buses. Our Eagle Transit budget for FY 2020 is balanced, accounting for all of these factors.

- Staff participated in admin and Commissioner FY 2020 budget reviews.
- We continue to work with DPHHS to amend our FY 2019 budget based on the final increased federal funding allocation.
- We are working on our FY 2020 budget for DPHHS, which includes a continuation of the federal finding increases from FY 2019 as well as a very slight increase in state funding.
- Staff submit financial reports monthly to DPHHS.

Building

- We are working with Maintenance and the Kalispell Senior Center on new flooring options for the Senior Center Activity Room.

HR/Staff Development

- Commissioners approved pay grade changes for several positions to facilitate recruitment and retention. We currently have three AOA positions that we are in the process of filling.
- Commissioners also approved a .25 FTE increase for an Eagle Transit Dispatcher.

State/Federal/Legislative Issues

- Area Plan on Aging
 - Lisa presented the new 4-Year Area Plan on Aging to the AOA Advisory Council on 4/11/2019 and to County Commissioners on 4/15/19. Commissioners voted to approve the Plan on 4/22/19. The Plan was submitted to DPHHS on 4/22/19.
- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
 - Lisa attended the quarterly meeting in Helena April 24-25. The next meeting will be in August.
 - Lisa participates on two subcommittees that assist the DPHHS State Unit on Aging with contract administration and program improvement.
 - Budget and Funding – newly formed subcommittee to analyze and monitor federal and state funding allocations to Area Agencies on Aging
 - Legal Services – subcommittee to advise the state on redesigning the Legal Services Developer program that provides federally mandated legal advice and services to older adults.
 - M4A priorities for the recently concluded state legislative session included restoration of the 2.5% state general fund cut to Area Agencies on Aging in the last session, restoration of/new provider rate increases, restoration of funding for other supportive services that older adults depend on like the Office of Public Assistance, adequate funding of Home and Community-Based Medicaid Waiver slots to reduce waiting lists and exploration of options for long-term funding stability for aging services given the rapid rise in the aging population. A summary of legislative action related to older Montanans is as follows:
 - 2.5% state funding was not restored to the base budget for Area Agencies.
 - A .91% annual provider rate increase passed but will not cover the 2.5% cuts or inflation.
 - 100 slots were added to the Big Sky Waiver to support older adults in their homes and communities instead of nursing facilities, but funding was taken from the Older Montanans Trust Fund which does not have an ongoing revenue source.
 - The Children and Families Interim Committee will conduct a study of Senior and Long-Term Care. M4A will provide input to the Committee.
 - Several bills passed to reduce the risk of elder abuse and financial exploitation

- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to members
 - Legislatively n4a is focused on reauthorization of the Older Americans Act which expires at the end of September.
 - Lisa will attend the annual n4a conference July 26-31 in New Orleans.

AOA Advisory Council

- The Council met on April 11th and voted to approve the new Area Plan on Aging.
- The Council would normally have met in May, but because of the need for the April meeting to approve the Plan, members voted to skip the May meeting and get back on schedule with the meeting on July 11th.

Outreach/Education/Media

Note: Transportation related outreach is noted in the Eagle Transit section below.

March

- 3/4/19, monthly interview on KGEZ, 15,000
- 3/6/19, provided 2EC assistance at two senior housing locations in Columbia Falls, 18
- 3/6/19, provided 2EC assistance at North Valley Senior Center in Columbia Falls, 6
- 3/8/19, Leadership Flathead panel presentation, 50
- 3/15/19, Daily Inter Lake article on grant award to Senior Mobile Home Repair, 17,500
- 3/17/19, presentation United Methodist Church in Kalispell, 9
- 3/17-19/19, promotion of BEC event at Gateway Community Center in DIL, 17,500
- 3/18/19, provided 2EC assistance at Center Court Apartments in Kalispell, 10
- 3/19/19, BEC benefits assistance event at Gateway Community Center, 25
- 3/26/19, Medicare 101 class, 22
- Multi-media promotion of Medicare 101 Class
- 3/28/19, outreach regarding SNAP for older adults at NW Food Bank, 42

April

- 4/4/19, hosted Flathead Senior Connect provider networking event, 20
- 4/5/19, AOA Council member (Linda Hunt) presentation at Health Dept. “Myths of Aging”, 5
- 4/16/19, BEC Outreach, 15
- 4/23/19, Medicare 101 class, 14
- 4/25/19, BEC outreach with UMC, Hungry Horse Community Dinner, 70
- 4/26/19, participated in monthly NWMT Care Transitions Coalition meeting, 30
- 4/26/19, psa in DIL re. Shred Event, 17,500
- 4/27/19, information table at Shred event
- Multi-media promotion of AOA Advisory Council meeting re. Area Plan on Aging, 47,000

Age-Friendly Flathead

- Immanuel Lutheran Communities has offered to take the lead on the local initiative. Meetings have not yet been set.

Eagle Transit

- Montana Department of Transportation (MDT):
 - 5-Year Transportation Development Planning Grant
 - Our consultant, David Kack, Mobility and Public Transportation Program manager at the MSU Western Transportation Institute, is working on recommended solutions for

Evergreen and a potential restructuring of our Columbia Falls and Whitefish routes/services. His report will be ready at the end of September, beginning of October.

- Staff continue to engage in ongoing conversation with Whitefish City planning staff and local stakeholders about partnering on potential transit projects, including exploration of grant funding for an electric bus.
- Staff just returned from Acadia National Park in Maine where we had the opportunity to meet with state DOT staff, the Park management team, Friends of Acadia (local philanthropic partner organization) and management and operations staff from Downeast Transit, the local transit provider, as well as observe the routes. Acadia has a Cooperative Agreement with Downeast that is similar to our CA with Glacier National Park. Acadia's annual visitorship is similar to Glacier's, the season is almost identical and the surrounding communities are similar in size, population and distance from the Park. The FTA promotes the arrangement in Acadia as a model example of federal, state and local cooperation. The purpose of the visit was to learn how we might improve our operations in the Park and in the Valley, develop public-private partnerships for transit generally, and restructure our CA to maximize the benefits to Flathead County and the communities most impacted by Park visitorship.
 - Third quarter financial, program and vehicle reports were submitted at the end of April.
- Outreach/Education/Media/Special Events:
 - As required by federal regulations, a monthly ad ran in the Daily Inter Lake in March and April.
 - 3/6/19, The Daily Inter Lake promoted the March 11th transit meeting in Whitefish.
 - In March, KGEZ ran interviews with staff and ads
 - 4/1/19, KGEZ interview with Nicole Birk, Glacier Park Lead
- Operations:
 - We are exploring the possibility of a new Blue Line in Kalispell that would provide door to door fixed route service from senior and other apartment complexes to the medical complex and local pharmacies to reduce passengers' dependence on paratransit for medical rides. There is a lot of community interest. We're looking for private partners to fund the match.
 - We have now received all approved vehicles.
- Staff Development/Training:
 - Lisa, Tom and Nicole attended the annual Community Transportation Association of America (CTAA) conference in May. Tom and Nicole completed a course to become certified PASS (Passenger Assistance Safety and Sensitivity) trainers, which will allow us to train our drivers in-house rather than pay for travel to Great Falls. We will also be able to offer it as a service to local school districts. Lisa completed full-day intensives on procurement and marketing and participated in the finance/funding session track.
 - Staff attended the annual Montana Transit Association conference in Greta Falls in April.
- Transportation Advisory Committee (TAC)
 - The June 6th TAC was canceled as many members were unable to attend.
 - The next meeting will be August 1st.
- Glacier National Park
 - The Glacier Conservancy is donating funds to cover the costs of the "hiker-biker" service this year. The donation is on the agenda today for Commissioners approval. The hiker-biker service provides hiker transport and bike trailer service from Mother's Day weekend until the regular season starts on July 1.

- The commuter service from Kalispell to the Park will run through the regular season with new stops in Kalispell and fewer stops in Whitefish.
- Other – Lisa and Tom met with staff from the U.S. Government Accountability Office (GAO) on 4/16/19 in Great Falls to provide input on our experiences and challenges as a rural transit provider for their Rural Transit Coordination Review (103179) requested by the U.S. Senate Committee on Banking, Housing and Urban Affairs.

Nutrition

- We distribute nutritional education materials monthly to all home-delivered clients and all senior centers.
- We hosted our annual volunteer appreciation luncheon on Saturday, May 4th. Approximately 120 people attended.
- We hosted the annual Older Americans Day picnic on Friday, June 14th. Details will be reported next month.
- We completed the annual client satisfaction survey. Below are some results highlights:
 - Melas on Wheels:
 - 28% of respondents get a meal every day; 55% 4-5 times per week; 17% 3 or fewer.
 - 96% are very satisfied or satisfied with the quality of the food.
 - 97% are very satisfied or satisfied with the taste of the food.
 - 83% say getting a home-delivered meal makes it possible for them to continue to live in their homes.
 - 19% say the volunteer driver is the only person they see during the day; 52% say this is sometimes the case.
 - 100% say the volunteer drivers are friendly.
 - 42% have been on the program for 1-6 months; 16% for 6 months to 1 year; 18% for 1 to 2 years; 25% for 2 years or more.
 - 98% would recommend the program to a friend.
 - Social Dining (congregate meals)
 - 96% are very satisfied or satisfied with the quality of the food.
 - 97% are very satisfied or satisfied with the taste of the food.
 - 98% say the site managers are friendly and helpful.
 - 100% say the volunteers are friendly.
 - 96% say eating at the site improved their socialization with others.
 - 58% of respondents eat primarily at AOA; 16% at Whitefish Community Center; 14% at the North Valley Senior Center; and 6% each at Bigfork Community Center and the Lakeside Gathering Place.
 - Almost all of the written comments were about specific foods people like or don't like.

I & R/Assistance/Ombudsman/Independent Living Services

- Veteran Directed HCBS Program
 - Commissioners approved an MOA with 406 Financial Services to perform as the fiscal agent that assists veterans to fulfill their responsibilities as the employer of their attendants (like payroll and tax withholding/reporting).
 - We were unable to fill the Care Coordinator position upon initial posting. Commissioners approved a higher pay grade for the position and we re-posted. We're in the process of reviewing applications now.

- Because we were unable to fill the Care Coordinator position as anticipated, we are postponing the transition to September 1st. We will continue with our current operational and financial arrangement with Area VI until the transition is complete.
- Independent Living Services:
 - Although we have additional federal funds for service provision, we are unable to bring clients off the waiting lists until we fill vacant staff positions.
 - We completed the annual client satisfaction survey. Below are some results highlights:
 - 100% of respondents felt AOA staff treated them in a respectful and professional manner.
 - 100% said they received needed information about services and steps in the process.
 - 97% said they began receiving services within 2 weeks of approval.
 - 94% said the services have been reliable.
 - 97% are satisfied with the quality of the services.
 - 94% said they get enough of the service to meet their needs.
 - 97% say the service helps them continue to live at home.
 - 97% are satisfied with the service overall.
- Benefits Enrollment Center grant
 - Staff have worked with partners to offer BEC education and screening events over the last several months
 - As part of the BEC grant, our Community Outreach Coordinator (along with staff from Area VI) is attending the annual National Council on Aging (NCOA) conference this week in Washington, D.C.

Senior Mobile Home Repair

- The SMHR program is on track to transfer to a new fiscal host, the Flathead Community Foundation. Once they've completed the required documentation on their end we're sure all related claims have been processed we can transfer the balance of the program funds to the Foundation.
- We've completed the transfer of existing lien funds from the AOA's discontinued HOME program to CAPNM's HOME program to benefit senior home owners in Flathead County. We will transfer any new lien repayments per the same agreement.

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- Lisa and Beth met with Kalispell Senior Center board members on 4/30/19 to talk about multiple issues, including the flooring in the activity room, ongoing communications and partnering, and governance training.
- Lisa and Beth met with the Whitefish Community Center board on 5/16/19 to go over the budget/funding, contractual requirements, governance training, etc.
- Lisa and Beth met with board members from the Bigfork Community Center on 5/31/19 to discuss building concerns/options, new program staff and initiatives at the Center, community involvement and governance training/strategic planning.

June 2019 Report: Performance Measures Tables - April 2019 stats (FY 2019)

83.33%

MEASURE	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017	April	Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
# Receiving Independent Living Services	178	233	110	47%	62%	2	95	97	98	99%
# Receiving Meals on Wheels	470	465	374	80%	80%	27	345	372	465	80%
# Seniors Receiving Congregate Meals	1,785	1,000	1,404	140%	79%	71	1,309	1,380	1,200	115%
# Eagle Transit DAR Unduplicated Riders	401	500	331	66%	83%	17	302	319	450	71%
% of Service Recipients at Moderate to High Risk of Institutionalization	89%	88%	92%	105%	103%	87%	90%	87%	88%	99%
Per Meal Cost of Nutrition Services	\$6.89	\$6.75	\$6.29	93%	91%	not yet available	\$6.52	not yet available	\$7.00	#VALUE!
% Overall Satisfaction with AOA Services from Annual Survey	N = 99%, IL = 96%	95%	N=97% IL=90%			97% N 97% IL	N/A		95%	
Maximum annual number of transportation complaints	30	36	12	33%	40%	0	4	4	36	11%
WORKLOAD INDICATOR	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017		Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
Outreach/Education/Media						Mar/Apr				
Public Outreach/Education/Media Efforts	123	120	116	97%	94%	21	89	110	120	92%
Nutrition						April				
Total Meals	82,428	79,000	80,639	102%	98%	7,265	57,867	65,132	80,000	81%
MOW	49,695		47,409	N/A	N/A	4,283	34,298	38,581		
Congregate	32,733		33,230	N/A	N/A	2,982	23,569	26,551		
Nutritional Assessments Conducted	2,424	1,550	1,846	119%	76%	108	1522	1,630	2,000	82%
Transportation						April				
Total Ride Count	85,305	90,000	99,104	110%	116%	10,643	83,650	94,293	90,000	105%
Dial-A-Ride Count	30,025	30,000	31,645	105%	105%	2,274	20,312	22,586	30,000	75%
City, Commuter and Other Ride Count	55,280	60,000	67,459	112%	122%	8,369	63,338	71,707	60,000	120%
Eagle Transit Outreach/Special Events	40	15	42	280%	105%	5	24	29	24	121%
Information and Referral/Assistance						April				
Info and Referral/Assistance Contacts	17,523	18,000	19,429	108%	111%	2,385	20,529	22,914	18,000	127%
Independent Living			93%			April			83%	55%
Homemaker Units of Service	784	2,500	2,005	80%	256%	118	1084	1,202	1,324	91%
Escorted Transportation Units of Service	792	1,739	2,314	133%	292%	78	674	752	1,391	54%
Respite Units of Service	992	2,468	2,079	84%	210%	53	1323	1,376	3,250	42%
Community Support/Senior Companion Units of Service	1,060	1,353	1,310	97%	124%	31	446	477	1,176	41%
Personal Care Units of Service	358	435	231	53%	65%	15	107	122	65	188%
Benefits Counseling						April				
Benefits Counseling Hours of Service	600	450	502	112%	84%	40	1082	1,122	450	249%
Ombudsman						April				
Ombudsman consults/cases opened	1034	1,100	1,250	114%	121%	92	813	905	1,100	82%